

## Phoenix Program Process Definition – Vendor Maintenance

Process	<b><i>Update an Existing Vendor</i></b>
Process Number	<b><i>AP-002</i></b>

### ***Description of Process***

This process will be used by agency customers to add a new vendor location or change an address on a existing vendor in the Statewide Vendor file.

Customers should first thoroughly search the vendor record to confirm that the information is not already contained in PeopleSoft before any change requests are made.

### ***Input to Process***

Agency receives invoice and/or billing information from a vendor (including state employee) that does exist in the vendor file and is expecting to receive an expense payment. The agency determines that the invoice address is not contained in the existing vendor record.

### ***Output of Process***

An Electronic change request is sent to [psvendor@ga.ga.gov](mailto:psvendor@ga.ga.gov) and is received for review by Financial Distribution and requests are processed.

### ***Service Level Agreement Required? (if yes, provide a brief description)***

Financial Distribution will research and process the electronic request by the end of the next business day.

### ***PeopleSoft Panel Groups being Used***

Function	Panel Group
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**Use**

Administer Procurement – Maintain Vendors – Use – Vendor Information – Identifying Information - Correction

***Business Process Description***

Process Description	Responsibility (Agency/Centralized)
<p><u>Step 1: Receive Invoice and/or Billing Information</u></p> <p>Agency customer should verify that the vendor does exist in the Statewide Vendor File. This can be accomplished by searching the vendor file by FEI/SSN number, vendor number, vendor short name, or vendor long name. Once the vendor is located the customer will review the addresses to determine whether the desired address is contained in the Vendor File.</p>	Agency

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Process Description	Responsibility (Agency/Centralized)
<p><b><u>Step 2: Request addition of New Location or Address Change</u></b></p> <p>Agency customer will complete the Vendor Maintenance form to request that a new location be added or that an existing address be changed. The vendor change form may be obtained through the Phoenix Website located at <a href="http://phoenix.gagta.com/">http://phoenix.gagta.com/</a>. To locate the form, navigate to Financials - PO - Forms or Financials - AP-Forms.</p>	Agency
<p><b><u>Step 3: Complete Vendor Maintenance Form</u></b></p> <p>Check the appropriate box on the form for either changing information or adding a new vendor location. <b>Include the Vendor Name as well as the vendor number and/or FEI/SSN on all requests.</b> Please complete the form in its entirety. Use the comment section of the form for fields that are not represented.</p> <p>Vendor name changes require documentation from the vendor. A letter from the vendor, copies of the legal name change papers from the Secretary of State's office, <b>or</b> a new W-9 are required for a name change. Please contact the vendor Help desk at 404-657-3956 or 1-888-896-7771 for additional information regarding required documentation.</p>	Agency
<p><b><u>Step 4: Submit completed form to Financial Distribution Team</u></b></p> <p><b>The completed form must be sent as an e-mail attachment to GTA at <a href="mailto:psvendor@gtg.ga.gov">psvendor@gtg.ga.gov</a>.</b> In e-mail subject line, please indicate whether the request is to change an existing location or to add a new location.</p>	Agency
<p><b><u>Step 5: Process Vendor Maintenance Form</u></b></p> <p>If the request is for an additional location, it will added to the Vendor record. This function will be performed by the Financial Distribution Team by the end of the next business day.</p> <p>For a vendor change, the Team member will review existing information before processing the change. After a review of the information, the Financial Distribution Team member will process the change request by the end of the next business day.</p> <p>The Financial Distribution Team may send an e-mail to the customer to resolve any questions regarding the Vendor Maintenance Form.</p>	Financial Distribution
<p><b><u>Step 6: Confirm Change Completion</u></b></p> <p>Financial Distribution Team will e-mail customer when change is complete.</p>	Financial Distribution

## Phoenix Program Process Definition – Vendor Maintenance

### Step 7: Review Vendor Information

Review vendor information panels (Go – Administer Procurement – Maintain Vendors – Inquiry – Vendor Information).

Agency

### ***Forms Used with Process***

Vendor Maintenance Form

## APPROVAL FORM

SIGNER	ROLE	APV	NOT APV	DATE
Kay Reid	Team Lead Financial Distribution	X		9-18-02